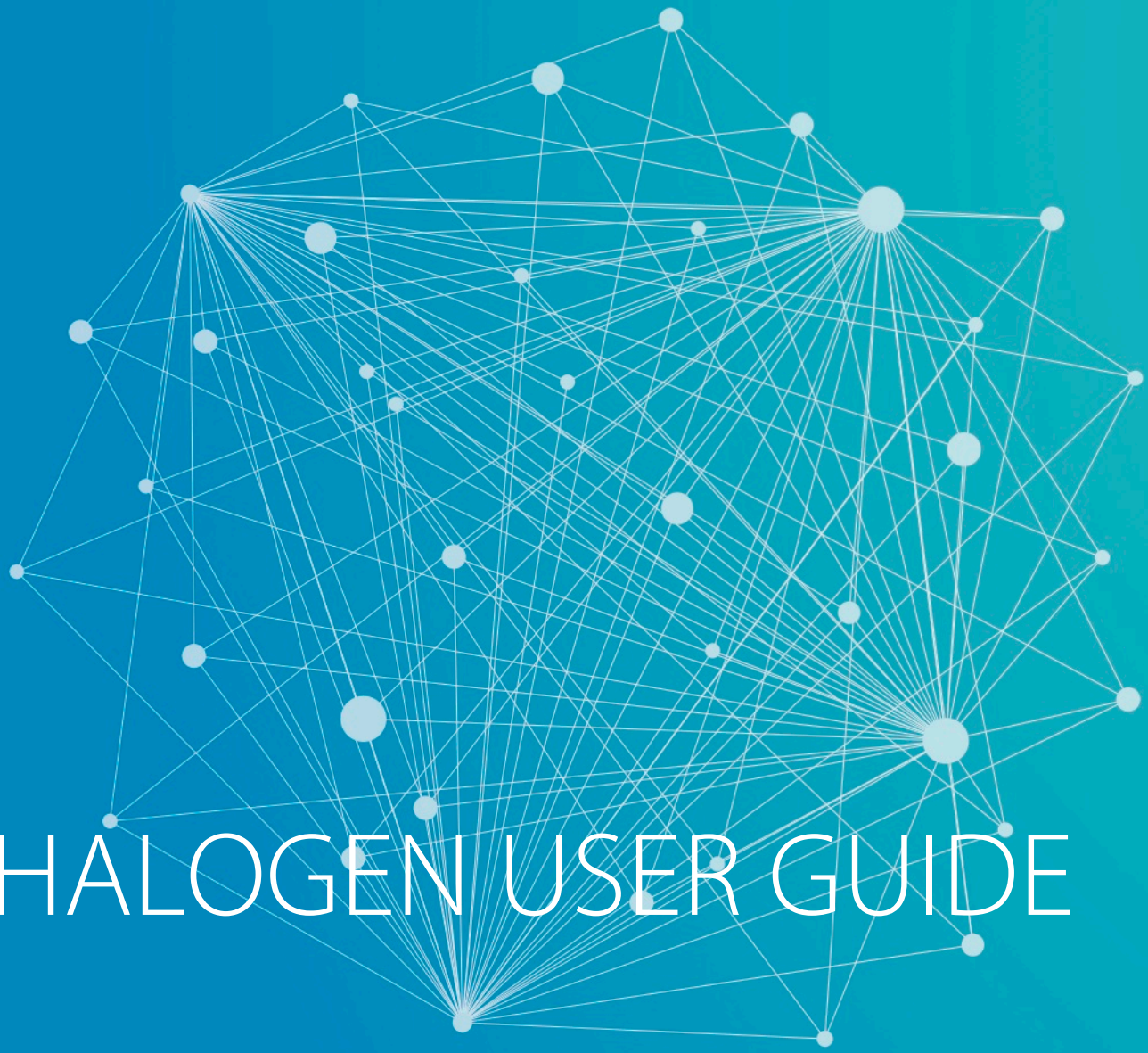
UNIVERSITY OF OTTAWA

Employees



HALOGEN USER GUIDE

uOttawa

Ressources humaines
Human Resources

Disclaimer notice

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Logging in to Halogen

Starting a session

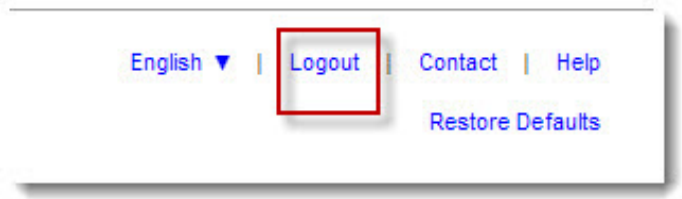
Session length is limited to two hours. Once you are logged in, you can remain logged in for two consecutive hours. After two hours, you are automatically logged out.

uOttawa
HALOGEN
SOFTWARE
Connexion / Login
Nom d'utilisateur / Username:
Mot de passe / Password:
Connexion / Login
Pour vous connecter, veuillez entrer votre nom d'utilisateur et mot de passe, qui sont les mêmes que vous utilisez pour votre compte courriel (par exemple, mtremblay). Pour obtenir de l'aide pour la connexion, veuillez communiquer avec le Centre d'assistance informatique en ligne au www.sic.uottawa.ca/cybersos ou par téléphone (613) 562-5800, poste 6555.
To login, enter your username and password, which are the same as your email account (ex. msmith). For assistance with login, please contact the Computing Help Centre online at www.ccs.uottawa.ca/cybersos or by telephone (613) 562-5800, extension 6555.

1. Open Halogen.
2. Enter your user name.
3. Enter your password.
4. Click *Login*.

Ending a session

Halogen contains confidential data. As a security measure, you should sign out of Halogen session correctly by clicking *Logout* in the upper right corner of the screen.



Immediately after logging out, you will be taken back to the login page.

Introduction to Halogen

Introduction

This guide is designed to help you learn how to use Halogen and to act as a reference manual.

Why Halogen?

Halogen is a Web-based application for managing performance through the use of electronic forms and automated processes.

With Halogen, users can:

1. Set annual goals, indicate probationary periods, schedule mid-cycle meetings and complete annual performance evaluations for contract and regular staff through the use of forms.
2. Access the appropriate forms, based on their user type.
3. Automatically manage tasks to be completed, based on their user type.
4. Schedule automated email reminders to staff about completing tasks in Halogen.
5. Produce reports in real time.

User types

User types are tied to the position a staff member holds.

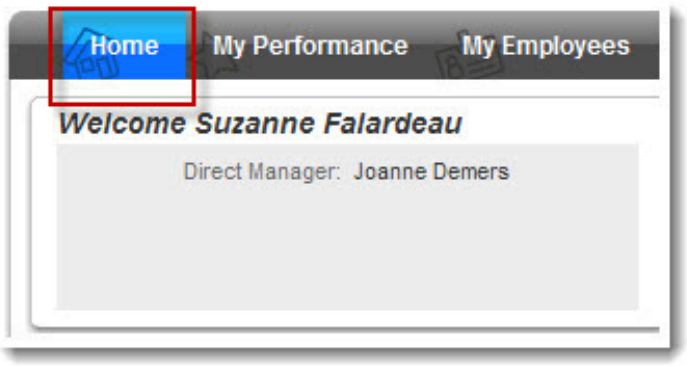
1. Employee: A staff member responsible for completing the goal-setting forms and the semi-annual and annual evaluation forms.
2. Supervisor: A staff member with direct-report employees.
3. Administrator: A Human Resources employee responsible for managing Halogen.

The Halogen interface

Finding your way around

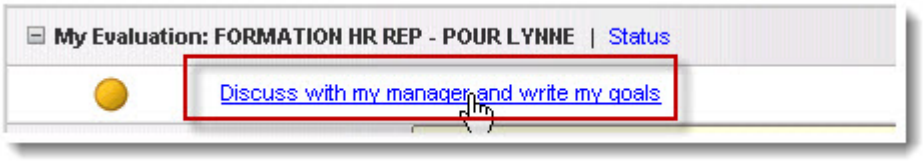
Here are a few helpful hints for finding your way around in Halogen.

1. A top tab highlighted in blue indicates the name of the page you are on.



2. Text in blue indicates a link, which opens in another window

.



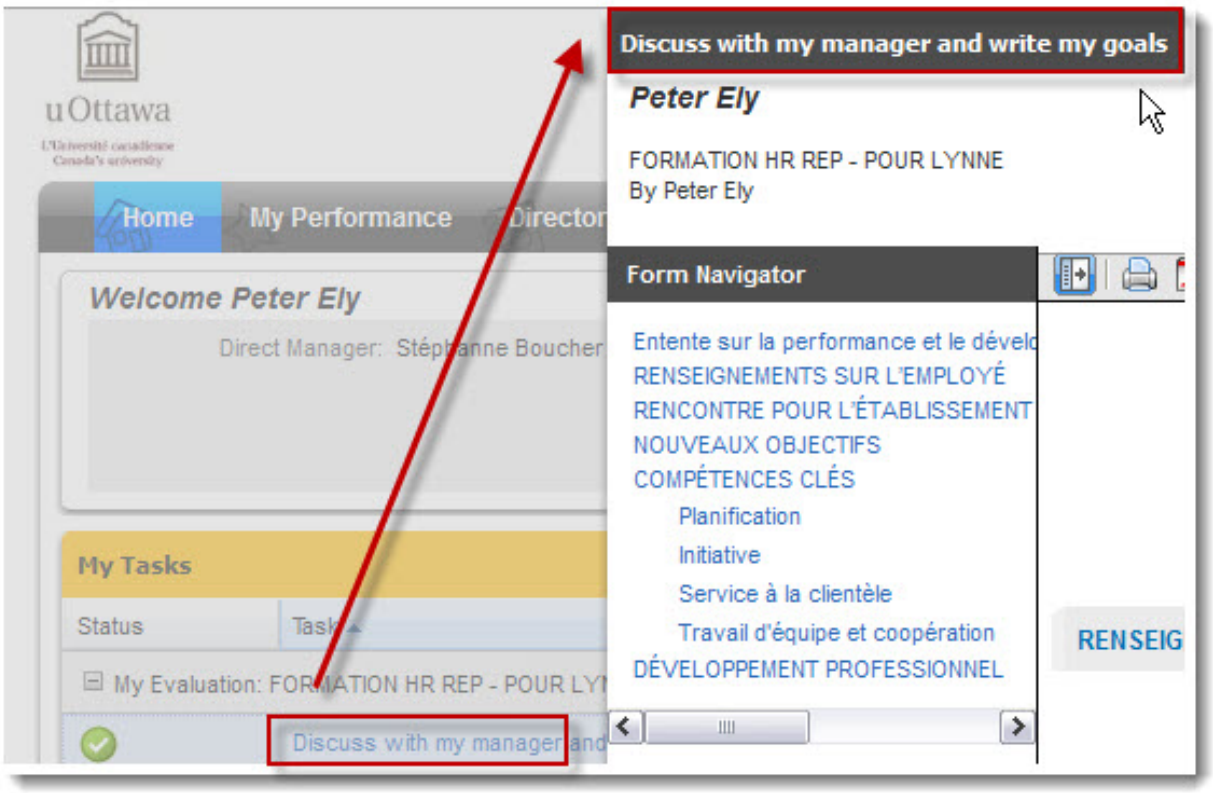
Changing the interface language

This application is available in both official languages, so you can work in the language of your choice.

The interface changes to French as soon as you select *Français*. However, when you change the language you are taken back to the Home page and not to the page you

were on when you changed the language.

The default language is set when a user account is created. Forms for the user will always appear in the user's preferred language. Whether you are using the French or the English interface, however, forms are always displayed and published in the preferred language chosen for the user when the account was created.

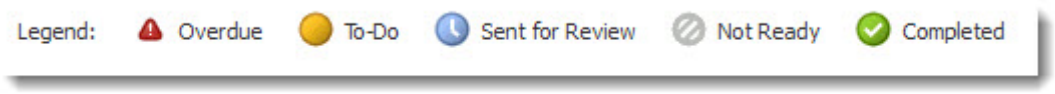


Tasks

In Halogen, steps to be completed in the ongoing process are considered "tasks." Employees' tasks may be, for example, entering their goals in an online form, and submitting them to their supervisor for review. Supervisors, of course, have a greater number of tasks since they must enter their own goals in addition to reviewing and

approving the forms submitted by each employee that reports to them. An icon indicates the status of each task.

Task status icons:



Icon	Meaning
	Task past due and requires attention.
	Task requires your attention but is not past due.
	Task awaiting third party review.
	Task is not ready for your participation.
	Task is completed and no longer requires your attention.
	Task requiring attention of another user but not past due.

Interface icons

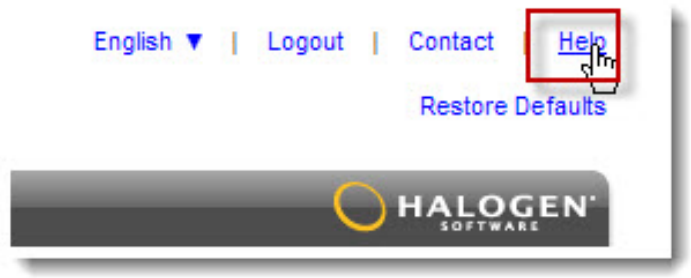
Icon	Function or meaning
	Links a goal to an organizational goal.

Icon	Function or meaning
	Erases a title, description, due date or success indicator of a goal.
	Indicates the goal is linked to an organizational goal.
	Indicates a date field that opens a calendar to enter a date.
	Starts spell checker. You will be asked to set the language.
	Adds a note.
	Expands or collapses the form navigator pane.
	Prints the form.
	Creates a PDF version of the form.
	Built-in language checker reviews text for any offensive or potentially embarrassing words or statements and suggests alternatives.
	Split screen function.

Icon	Function or meaning
	Closes the form.

Help

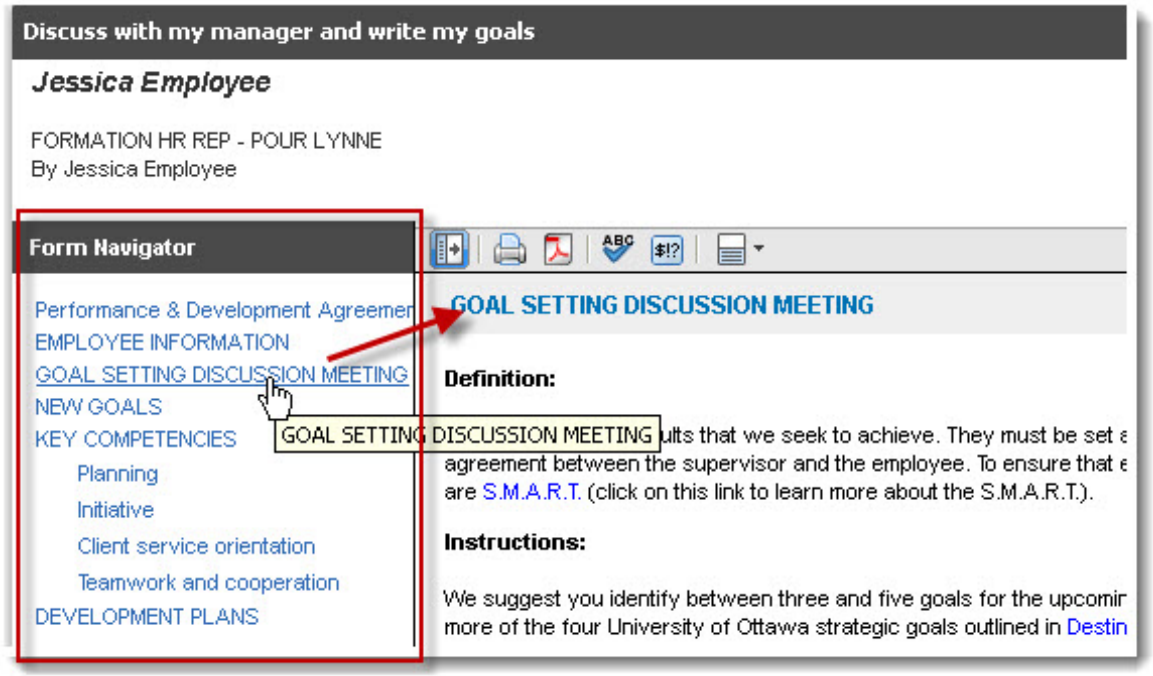
Online help is available in Halogen. Simply click *Help* in the upper right corner.



The form navigator pane

Each form (performance evaluation, goal setting, end of probationary period, mid-year evaluation, etc.) has multiple sections. The form navigator pane allows you to easily and quickly move between sections.

The form navigator pane appears to the left of the form. You can use either the form navigator or the scroll bar to move from one section of a form to another, although the navigator pane allows you to do so more quickly.

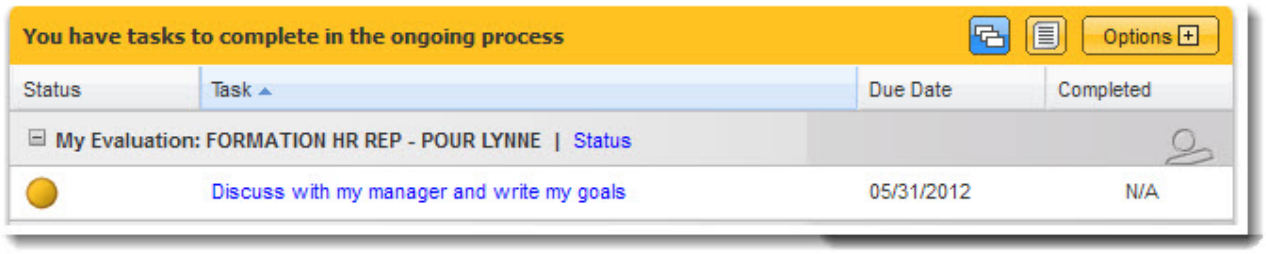

Discuss with my manager and write my goals
Jessica Employee
FORMATION HR REP - POUR LYNNE
By Jessica Employee
Form Navigator
Performance & Development Agreemer
EMPLOYEE INFORMATION
GOAL SETTING DISCUSSION MEETING
NEW GOALS
KEY COMPETENCIES
Planning
Initiative
Client service orientation
Teamwork and cooperation
DEVELOPMENT PLANS
GOAL SETTING DISCUSSION MEETING
GOAL SETTING DISCUSSION MEETING
Definition:
ults that we seek to achieve. They must be set a
agreement between the supervisor and the employee. To ensure that e
are S.M.A.R.T. (click on this link to learn more about the S.M.A.R.T.).
Instructions:
We suggest you identify between three and five goals for the upcomir
more of the four University of Ottawa strategic goals outlined in Destin

Main functions

Tasks to complete

The *You have tasks to complete in the ongoing process* pane provides employees and supervisors with an overview of any tasks they have yet to complete (their own tasks and those of any employees they have).

Users can display these tasks in grouped view, task view or in a single list. In addition, each column can be sorted in ascending or descending order.



This pane also displays the status and due date of tasks.

Users will usually receive an email indicating a task has to be started or completed. The email message can also include the user's log-in name, temporary password and a link to launch Halogen. Once logged in, the user sees a quick overview of any tasks requiring action.

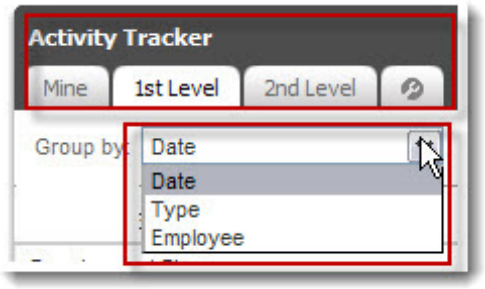
When a given process is complete and the supervisor has signed the form off, Halogen posts the form in the *Evaluation* section of the *My Performance* page.

Activity tracker

The activity tracker pane appears on the right-hand side of the home page. It lists journal notes, appraisals and documents that have been updated in *My Performance*. Items can be sorted by date (newest to oldest) or by type.

1. Changes made to goals and development plans appear only after the goal setting process has been completed, i.e., after the supervisor has given final approval.
2. The group of tabs that displays in the *activity tracker* depends on the user type.
   a. Employees: *Mine*.
   b. First-level supervisors: *Mine* and *1st level*.
   c. Second-level supervisors *Mine*, **1st Level** and **2nd Level**.
3. Activities in the *Mine* tab can be grouped by date or type.

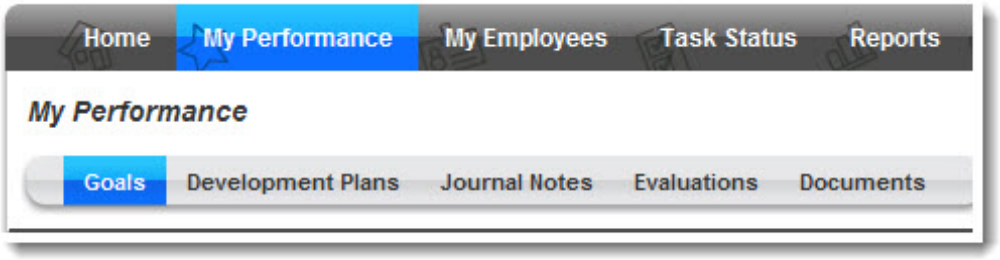
4. Activities of direct reports can be grouped by date, type or employee.



My Performance

My Performance

My Performance is a centralized portal where a user can access and update performance information in the following sections:



- Goals
- Adding a development plan
- Adding a journal note
- Evaluations
- Documents

Supervisors have access to these same five sections in the *My Employees* page.

Important:

If you add goals or development plans in *My Performance*, this information is not automatically added to the goal setting form completed at the start of the performance evaluation cycle. As a result, these goals and development plans will not be formally evaluated at the end of the cycle.

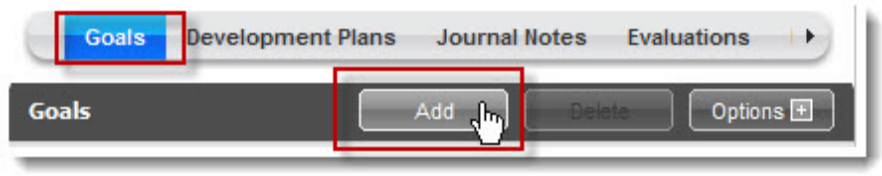
Adding a goal

A goal is a target that an employee is encouraged to reach, generally within a specified period of time. Goals can be added by both employees and supervisors. An employee can also add goals after an evaluation has taken place. Employees and supervisors can consult the employee's goals at any time. Goals entered in the goal setting form will appear in this section once the goal setting process has been completed.

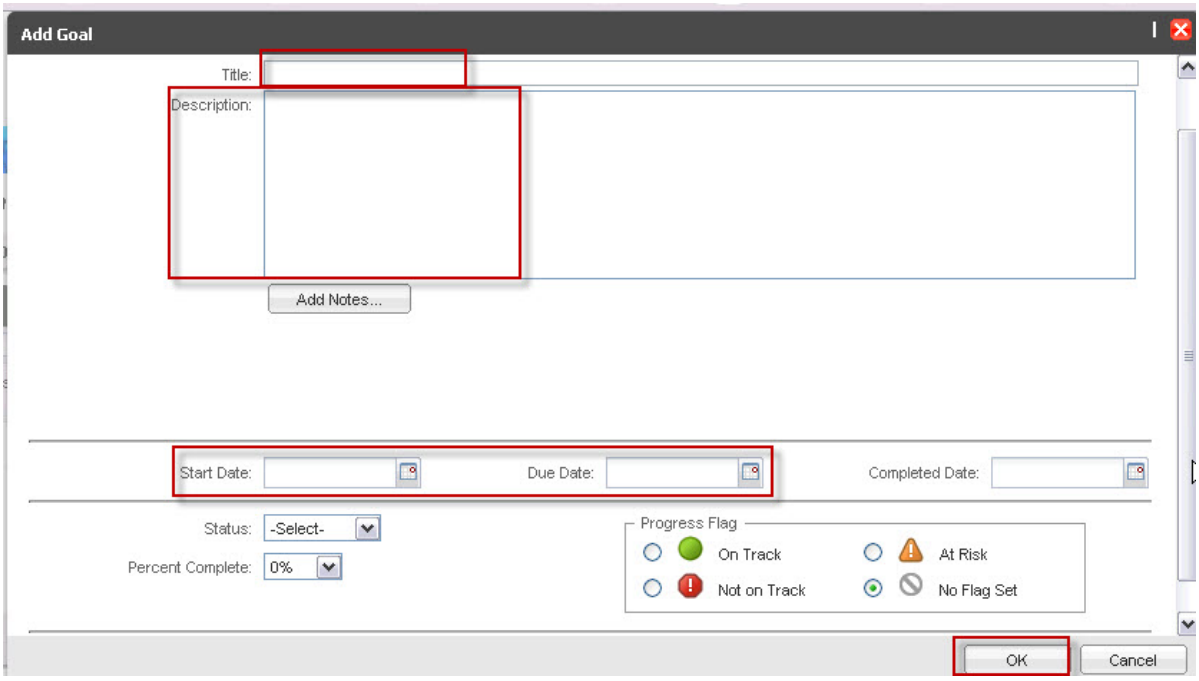
1. Supervisors: click *My Employees* and then the name of the employee for whom a goal is to be added.
2. Click *Goals*.

   NB: The objectives you added will not be kept in the goal setting form that you completed at the beginning of the cycle.

3. Click *Add*.



4. Enter a *title* in the Title field. .

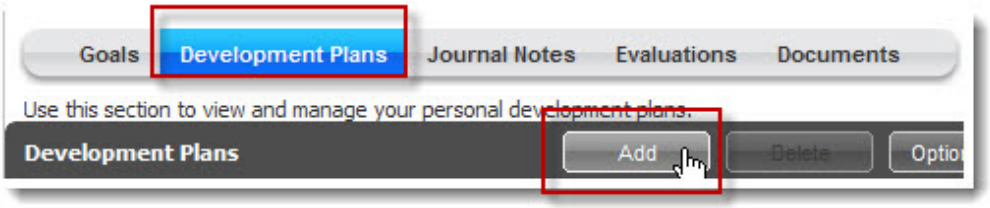


5. Provide a detailed description of the goal in the *Description* field.
6. Click on the calendar icon next to the Start *Date field* and select a start date.
7. Click on the calendar icon next to the *Due Date* field and select a due date.
8. Click *OK*.

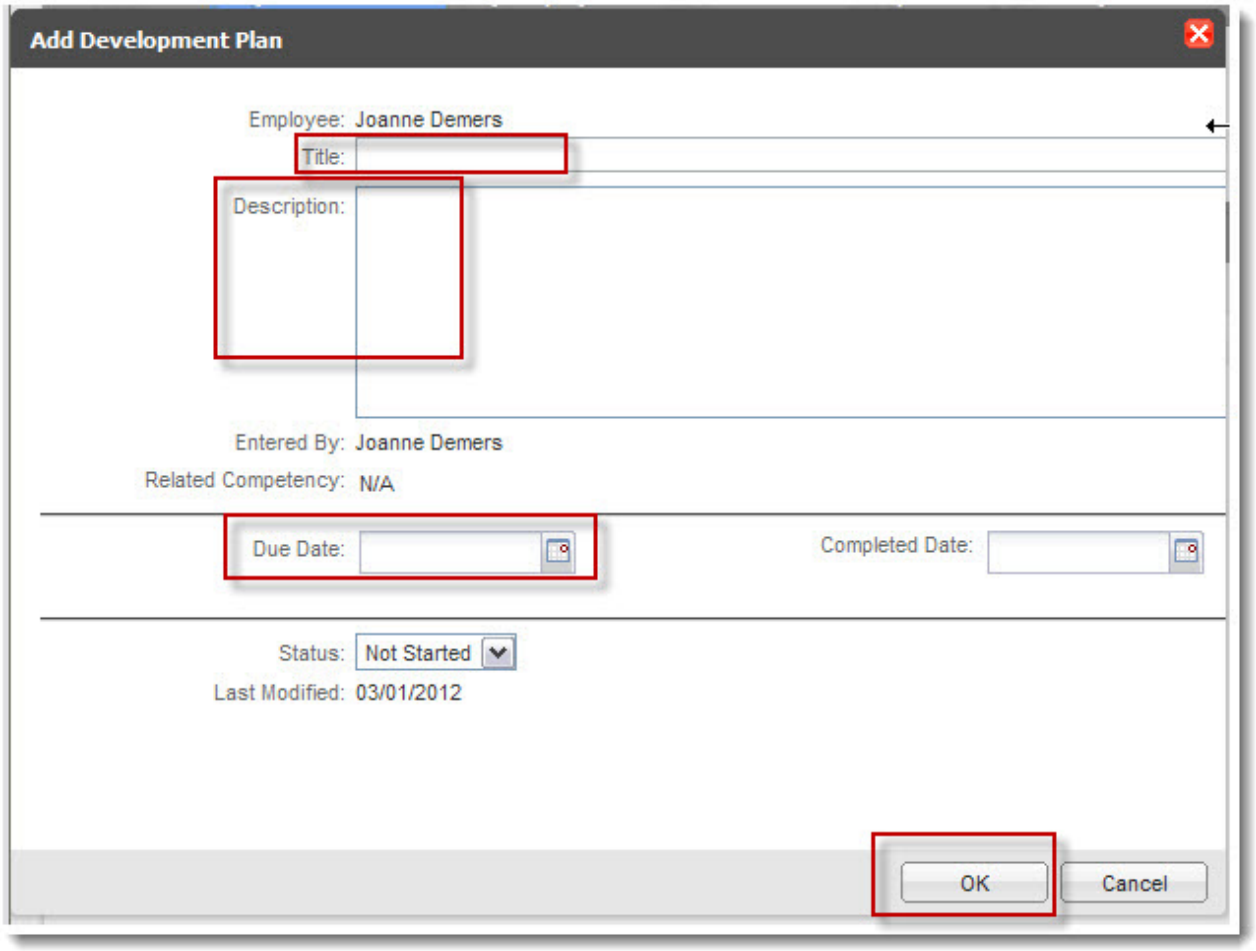
Adding a development plan

A development plan added here will not be added to the goal setting form completed at the start of the cycle.

1. Supervisors: click *My Employees* and then the name of the employee for whom a development plan is to be added.
2. Click *Development Plans*.
3. Click *Add*.



4. Enter a title in the *Title* field.

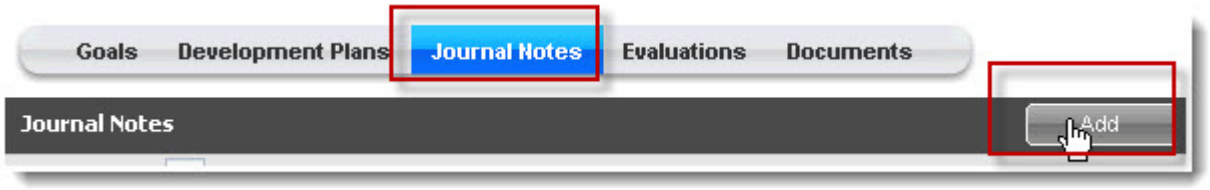


5. Provide a detailed description of the development plan in the *Description* field.
6. Click on the calendar icon next to the *Due Date* field and select a due date.
7. Click *OK*.

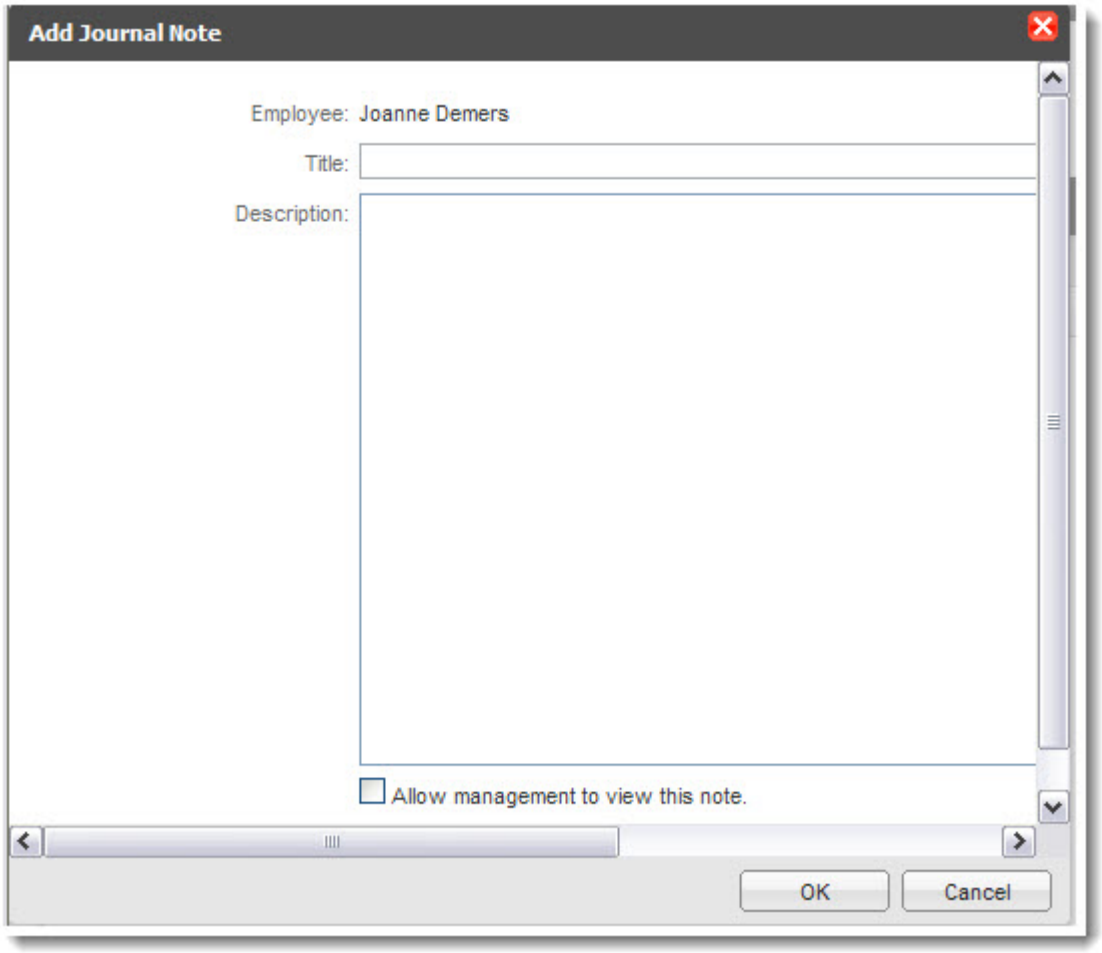
Adding a journal note

Employees can use the journal notes section to track their achievements during the year, which can be helpful at evaluation time. For example, a journal note could be added to note registrations increased by 2%.

1. Supervisors: click *My Employees* and then the name of the employee for whom a journal note is to be added.
2. Click *Journal Notes*.
3. Click *Add*.



4. Enter a *title* for the note in the Title field.



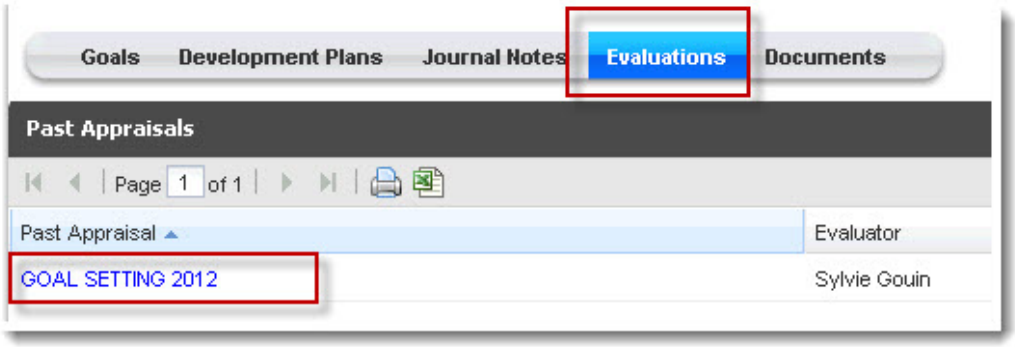
5. Enter the journal note details in the *Description*.
6. Employees who arrived at this section through the My Performance page can check the box next to *Allow management to view this note* if they wish to allow their supervisor to see this note. Supervisors who arrived at this section through the My Employees page can check the box next to Let the employee view this note if they wish to allow their employee to see this note.
7. Click *OK*.

Evaluations

Supervisors may review their own forms and evaluations as well as those of their employees at any time. This allows supervisors to monitor both personal and employee progress.

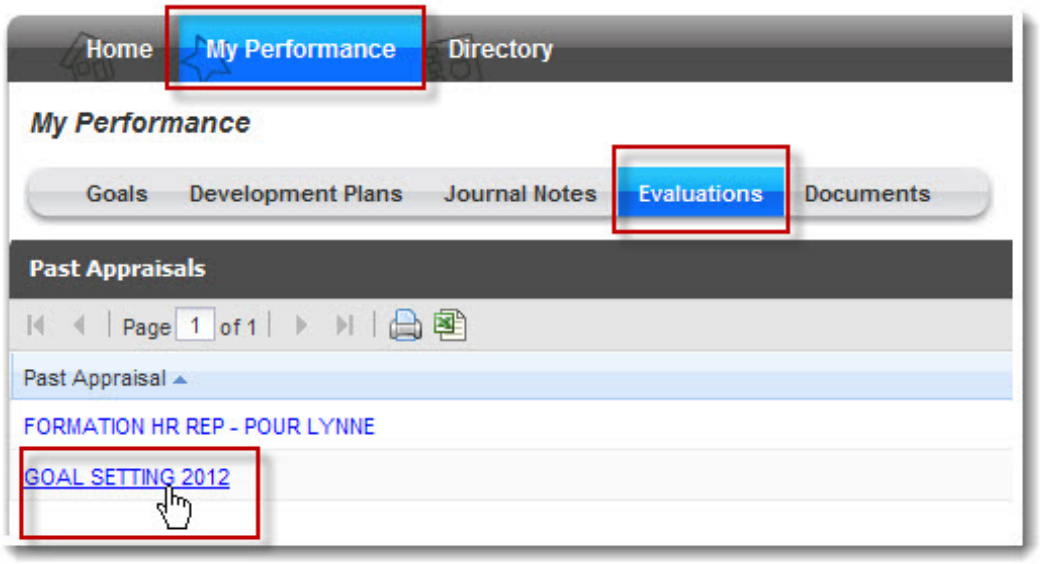
Note:

Past appraisals have not been imported into Halogen. Therefore, 2012 is the first annual performance evaluation cycle to be recorded in Halogen. Once the 2012 goal setting process is complete, this form will appear in the *Evaluations* section.

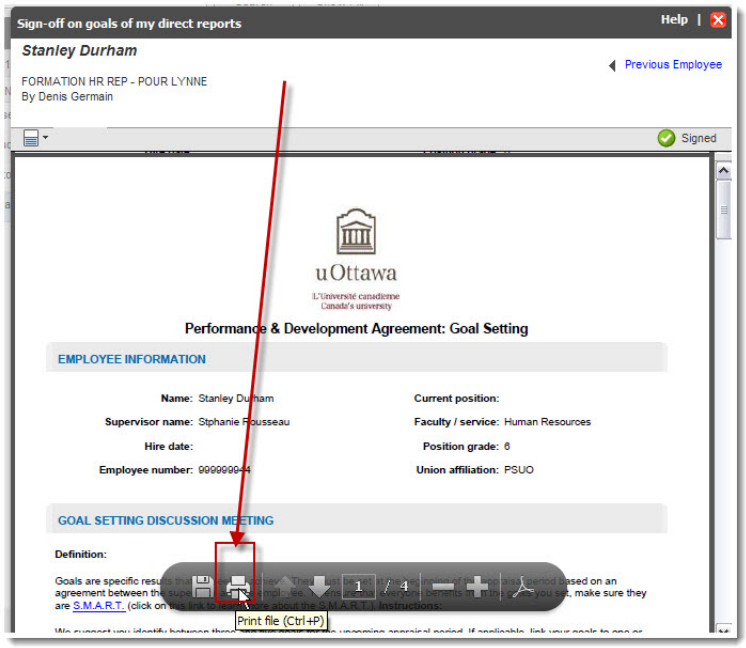


Print a completed form

1. Click the *Ma Performance* tab.
2. Click the *Evaluations* tab.
3. Click on the name of the form to be printed in order to create a PDF document.



4. Once the PDF form appears, place your curser at the bottom of the document to view the translucent Adobe toolbar.
5. Click on the printer icon on the toolbar.
6. Click *Print* to send your document to the printer.



Adding a document

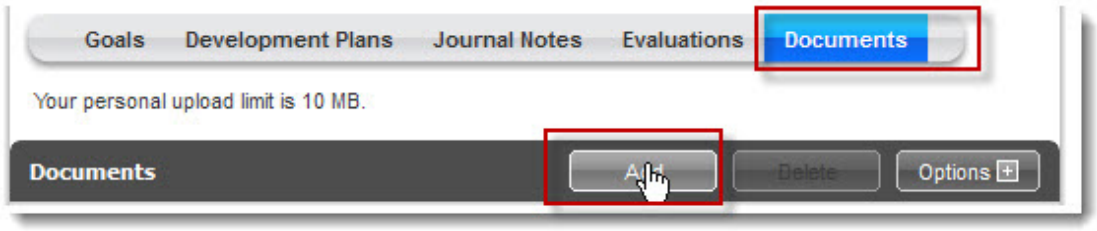
Employees can add, consult and delete performance-related documents for themselves. Supervisors can add, consult and delete performance-related documents for themselves and their employees.

Supervisors can set document visibility parameters (access) for any documents they add for an employee by selecting the *Employee and Management* or the *Management radio button*.

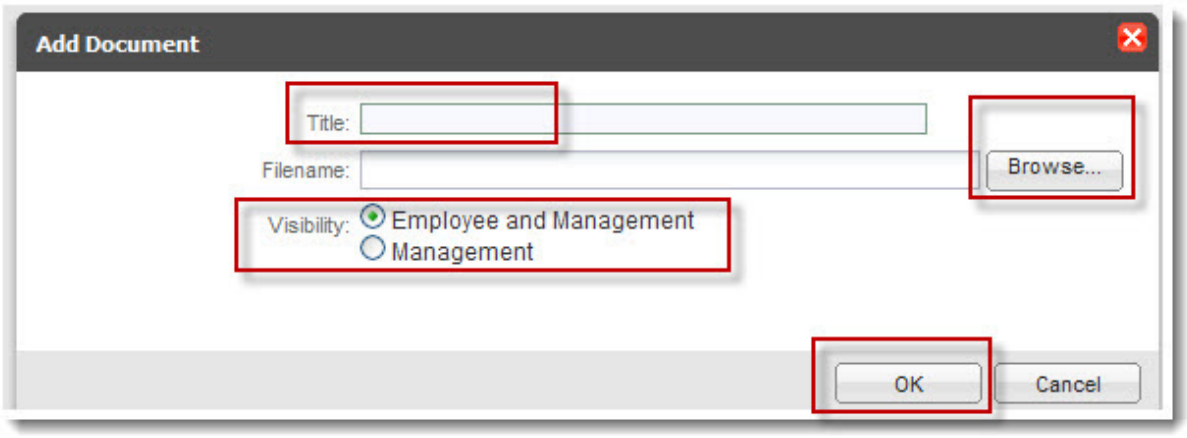
Users can add documents with the following filename extensions :

- .PDF
- .DOC
- .DOCX
- .TXT
- .XLS
- .XLSX
- .JPG
- .GIF
- .BMP

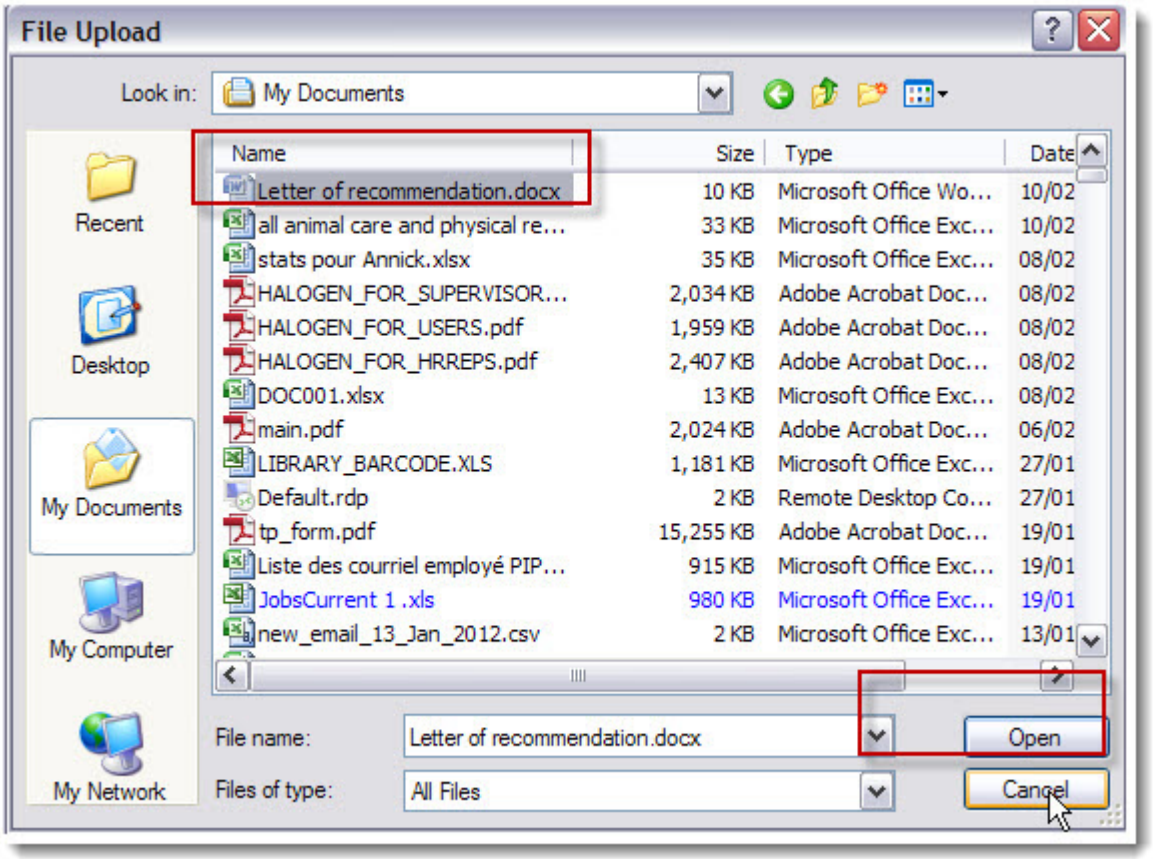
1. Click the *Documents* tab.
2. Click *Add*.



3. Enter a title for the document in the *Title* field.
4. Click *Browse*.



5. Locate and click on the document to be added.
6. Click on the Employee and Management or the Management radio button to set document visibility (access).
7. Click *Open*.

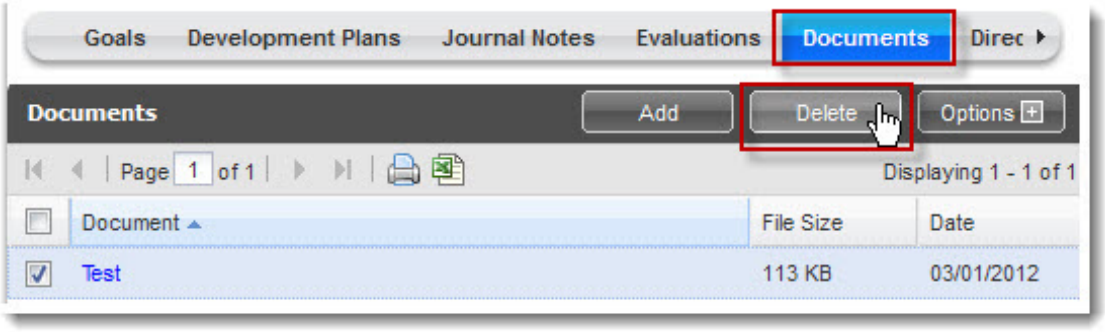

File Upload
Look in:
My Documents
Recent
Desktop
My Documents
My Computer
My Network
Name
Size
Type
Date
Letter of recommendation.docx 10 KB Microsoft Office Wo... 10/02
all animal care and physical re... 33 KB Microsoft Office Exc... 10/02
stats pour Annick.xlsx 35 KB Microsoft Office Exc... 08/02
HALOGEN_FOR_SUPERVISOR... 2,034 KB Adobe Acrobat Doc... 08/02
HALOGEN_FOR_USERS.pdf 1,959 KB Adobe Acrobat Doc... 08/02
HALOGEN_FOR_HRREPS.pdf 2,407 KB Adobe Acrobat Doc... 08/02
DOC001.xlsx 13 KB Microsoft Office Exc... 08/02
main.pdf 2,024 KB Adobe Acrobat Doc... 06/02
LIBRARY_BARCODE.XLS 1,181 KB Microsoft Office Exc... 27/01
Default.rdp 2 KB Remote Desktop Co... 27/01
tp_form.pdf 15,255 KB Adobe Acrobat Doc... 19/01
Liste des courriel employé PIP... 915 KB Microsoft Office Exc... 19/01
JobsCurrent 1 .xls 980 KB Microsoft Office Exc... 19/01
new_email_13_Jan_2012.csv 2 KB Microsoft Office Exc... 13/01
File name:
Letter of recommendation.docx
Open
Files of type:
All Files
Cancel

8. Click *OK*.

Deleting a document

You can delete a document from the *Documents* section.

1. If you are a supervisor, click *My Employees* and then the name of the employee whose document is to be deleted.
2. Click the *Documents* tab.

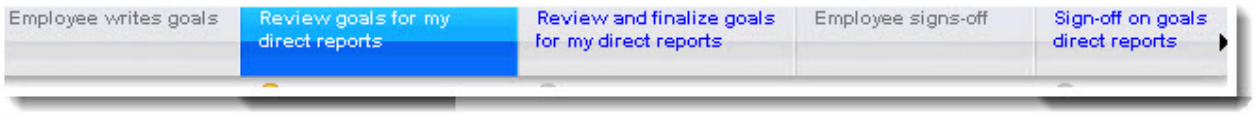


3. Put a checkmark in the box next to any documents to be deleted.
4. Click *Delete*.
5. Click OK.

Goal setting by the employee

Setting goals

The process of setting goals is broken down into tasks done by either the employee or the employee's supervisor.


Employee writes goals
Review goals for my direct reports
Review and finalize goals for my direct reports
Employee signs-off
Sign-off on goals direct reports

Start of the goal setting process: The supervisor schedules a meeting with the employee to set goals for the coming year, to identify the behaviours necessary to maintain or improve performance levels in each competency and to draw up a development plan that will allow the employee to achieve their goals and reach the required competency levels.

The employee must:

1. Enter the date of the meeting with the supervisor.
2. Add up to five goals
3. Enter the specific behaviours for each competency necessary in order to maintain or improve performance levels in each competency over the next evaluation period.
4. Enter a development plan.
5. Save the draft form (can be modified up until it is submitted for approval).
6. Submit the form for approval. The employee can no longer modify the form.

The supervisor must:

1. Review the draft of the employee's goal-setting form. If not satisfied, the supervisor can return the form back to the employee for necessary modifications. If satisfied, the supervisor approves the preliminary review and proceeds to the next step of the process.
2. Review and finalize the employee's draft form. At this step, the supervisor can write directly in the form to make necessary changes.
3. If necessary, add comments to key competencies.
4. If necessary, add comments to the development plan.
5. Save the form.
6. Complete the form

End of the goal setting process

The employee approves the goal setting form by entering his password. The form is now marked *completed*.

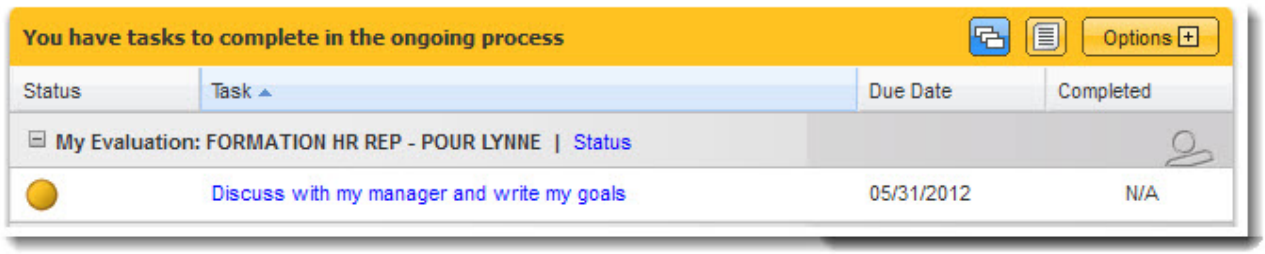
The supervisor gives final approval, also by entering his password to completing the goal setting process.

Meeting to discuss goals

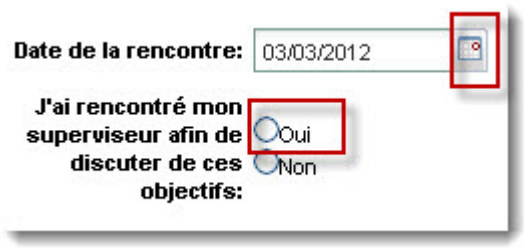
The first step in completing an annual evaluation is the employee–supervisor meeting in order to establish goals. Once the meeting has taken place, the employee drafts personal goals in Halogen.

Drafting goals (employees):

1. Click *Discuss with my manager and write my goals*.



2. Once the goal setting form opens, click the calendar icon in the meeting section, next to the *Date of discussion* field and select a meeting date
3. Select *Yes* to confirm that the meeting was held and that the goals were discussed with the supervisor

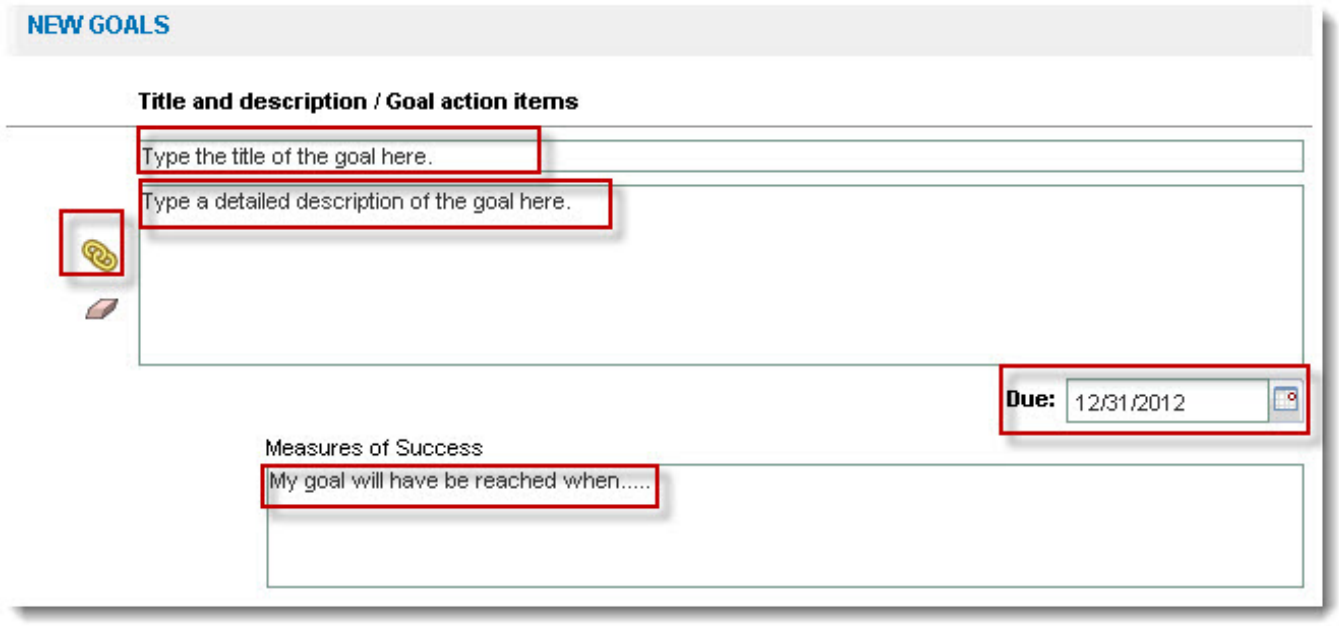


Adding a goal

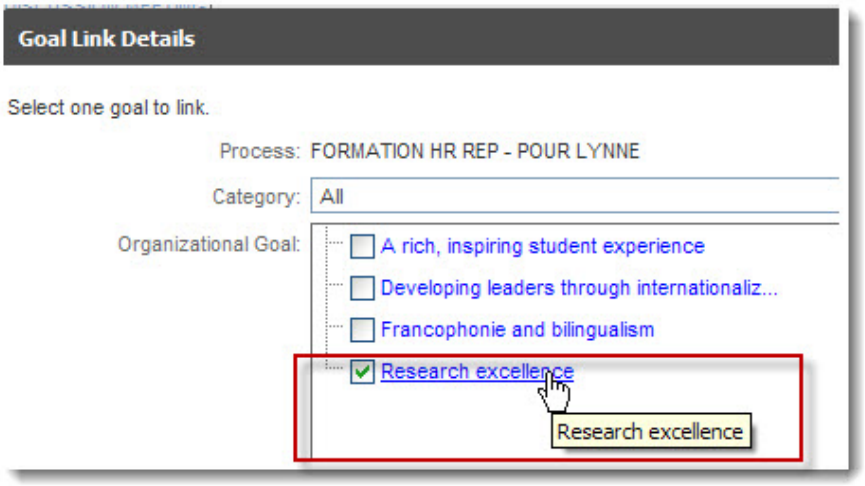
All employees must write up their goals at the start of the annual performance management cycle. Halogen allows the employee to enter up to five goals. The steps

below describe the process for drafting and editing a goal (for employees) and for editing a goal (for supervisors):

1. Under the heading *Title and description / Goal action items*, type the title of the first goal.

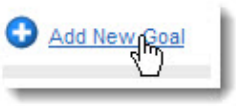

NEW GOALS
Title and description / Goal action items
Type the title of the goal here.
Type a detailed description of the goal here.
Due:
12/31/2012
Measures of Success
My goal will have be reached when.....

2. In the second box, type a detailed description of the goal.
3. Click the calendar icon next to the *Due* box and select the required date.
4. In the*Measures of successs* box, type one or more indicators.
5. Click the chain link icon to link the goal to an organizational goal.
6. Select the organizational goal the employee goal is to be linked to.



7. Click *Link*.

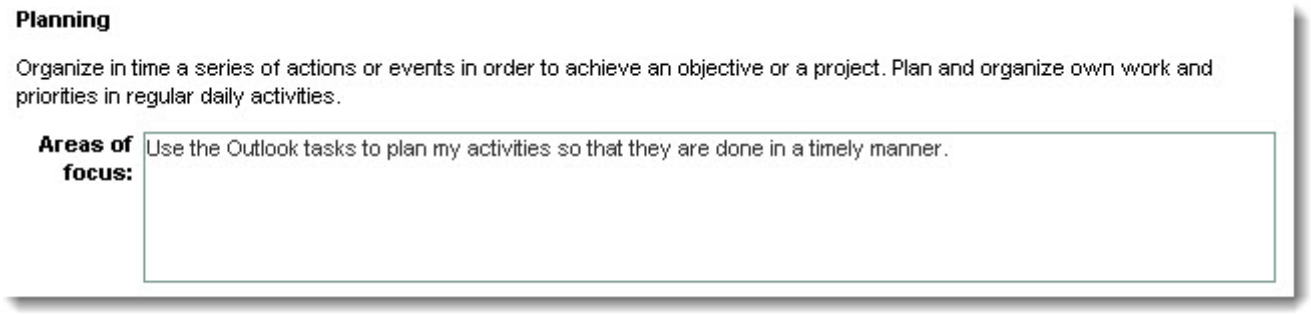
8. To add another goal, click *Add New Goal*.



Linking behaviours to key competencies

The key competencies section is for recording the behaviours an employee must adopt or maintain in order to improve or remain at their level of performance for each of the four competencies. When a supervisor opens a form submitted by an employee, the supervisor is able to make changes to the form. Next section describes the steps for an employee to record behaviours.

1. In the *Areas of focus* box, the employee describes a behaviour that will help them acquire, maintain or improve their level for a given competency.


Planning
Organize in time a series of actions or events in order to achieve an objective or a project. Plan and organize own work and priorities in regular daily activities.
Areas of focus:
Use the Outlook tasks to plan my activities so that they are done in a timely manner.

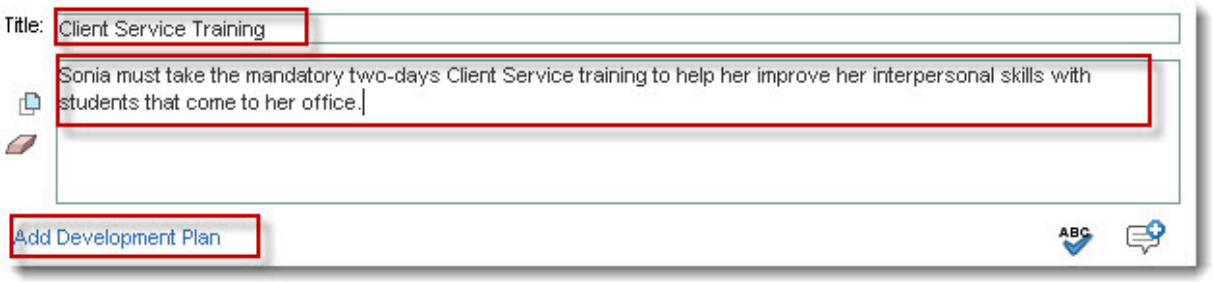
2. Click *Add Anotation* to attach any comments.

3. Repeat steps 1 and 2 for each of the other competencies.

Adding a development plan

Employees and supervisors can use the development plan section to describe possible training activities that would provide the employee with opportunities for career advancement or help the employee improve their skill level. The development plan can be completed by either the employee or the employee's supervisor. To add a development plan, follow the steps below.

1. Give the development plan a title.


Title:
Client Service Training
Sonia must take the mandatory two-days Client Service training to help her improve her interpersonal skills with students that come to her office.
Add Development Plan
ABC

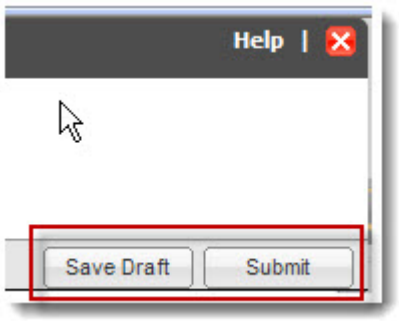
2. Enter a description of the proposed training activity.

3. Click *Add Development Plan* to add another plan.

Saving the draft version

Click *Save Draft* furthering order to save the form and continue editing. When you have finished entering your plan(s), click *Submit*. The form can now be viewed but not changed and is submitted to the supervisor for review and approval.

1. Click *Save Draft*



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2. Click *OK*

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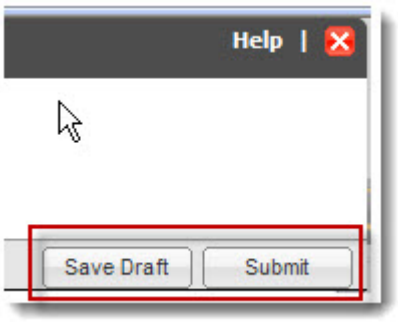
Submitting a form for approval

Once there are no further changes to make to the form, it is submitted to the employee's supervisor for review and approval. A supervisor cannot view the form until the employee has submitted it for review and approval.

Click *Submit* once there are *no more changes to be made* to the form.



Approbations

Employee final approval

Once a supervisor has reviewed and approved an employee's goal setting form, the supervisor sends the form to the employee for approval. The employee must:

1. Click *Sign off on my goals*.
2. Click *Sign off*.
3. Click *OK*.
4. Close the form